

DATE: \_\_\_\_\_  
 SUBJ: INFO AND ACTION MEMO, REF S. \_\_\_\_\_ S. \_\_\_\_\_ (U)

TO: DT

1. PROBLEMS: SOME PROBLEMS WITH S. \_\_\_\_\_ S. \_\_\_\_\_ PRACTICES AND PROCEDURES HAVE BEEN IDENTIFIED (ENC 1).
  
2. ACTIONS NEEDED: MANY ACTIONS ARE NEEDED TO REMEDY ABOVE PROBLEMS, AND TO ACHIEVE OVERALL PROJECT OBJECTIVES OF PRESENTING A CASE FOR OPERATIONAL RV TO THE NFIB (ENC 2).
  
3. RECOMMENDATIONS:
  - ☐ DETAIL FULL TIME TO :
    - o NEED FOR THIS ACTION IS INDEPENDENT OF THE LC POSITION BEING FILLED OR NOT.
    - o DETAIL WILL NOT INTERFERE WITH DUTIES OF EXISTING PERSONNEL OTHER THAN THRU DATA SUPPORT OR ADMIN REQUIREMENTS.
    - o AN SRI STAFFER (STATISTICIAN), OR POSSIBLY \_\_\_\_\_, MAY BE REQUIRED FOR OCCASIONAL ASSISTANCE.
  - ☐ IMPLIMENT IMMEDIATELY :
    - o DURATION: AT LEAST THRU COMPLETION OF NFIB REPT (9-12 MO.)
    - o RA. \_\_\_\_\_ WILL ASSUME DUTIES AS ACTING CHIEF, DT-ACD (WEEKLY CONTACT WILL BE MAINTAINED, ASSISTANCE PROVIDED AS NEEDED)

## SOME PROBLEM AREAS :

### 1. THERE IS/HAS BEEN SOME QUEING:

- LACK OF CONSISTENT DOUBLE BUND PROCEDURES FOR UTILITY ASSESSMENTS.
- PROGRESSIVE FEEDBACK, ESPECIALLY WHEN MANY SESSIONS CONDUCTED, LEADS TO "CONVERGENCE" TO TARGET.
- UP FRONT BIASES ON <sup>GENERAL</sup> NATURE OF TARGET TYPE HELPS IN NARROWING DOWN OPTIONS (10; SIT FLAVOR OR POL).
- MONITOR EXPECTATIONS COULD SKEW QUESTIONING.
- (HOW TO SEPARATE MONITOR FOCUSING FROM QUEING?)
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### 2. NOT ENOUGH UTILITY ASSESSMENT PROJECTS HAVE BEEN CONDUCTED:

- INCREASE SIZE, DIVERSITY
- DO MORE UTILITY ASSESSMENTS FOR NEW METARCOLOGIES (AS RECALIBRATION OF METHOD...).
- DIFFICULT TO ACCOMPLISH MEANINGFUL OVERALL ASSESSMENTS UNLESS SIZE INCREASED.

### 3. ROUTINE PROCEDURES MAY NEED IMPROVING (eg; FILE ACCESS CONTROL, MONITOR SESSIONS)

### 4. PERSONNEL ISSUES:

- INITIALLY, LITTLE OR NO CONCERN REGARDING PROPER PROCEDURES.
- STAFF LIMITED ON SIT INTEREST (REGARDING TASKS)
- NEED TO SCREEN BETTER. (Some ppl cannot relate!)
- MOTIVATION (for some) ON JOINING U.S.;

5. FUNDAMENTAL ISSUES:

- TARGETING: WHAT IS BEING ACCESED. ("RV", TEL/CV; <sup>with feedback</sup>)
- ROLE of feedback PACKAGE, <sup>pool knowledg</sup>, other.
- How best to "ACCESS" TARGET: what includes CRV/ECRV?
- RELATIVE MERITS of FRV, ECRV, WRV, other (i.e., <sup>with</sup> access-unw/rt);
- IS IT THE TRAINING PROCEDURE, OR THE PRACTICE?
- There appear to be "fundamental" to some aspects: what does this mean relative to various applications.

ACTIONS NEEDED

1. REVISE UTILITY ASSESSMENT PROJECTS AND PROCEDURES.
2. IMPROVE OPERATIONAL PROJECT RECORDS, PROCEDURES.
3. REEVALUATE ALL PROJECTS AND UPDATE OR COMPLETE ALL ~~EVALUATIONS~~. DEVELOP "IN DEPTH" FOR SOME.
4. EXAMINE DATA BASE FOR TRENDS, PATTERNS.
5. IMPLEMENT DATA BASE ANALYSIS PROCEDURES FOR ALL PROJECTS.
6. REEVALUATE ALL PROJECTS TO LOOK FOR POTENTIAL BIASING.
7. REEVALUATE TRAINING METHODS & IMPLEMENT ADVANCED TRAINING PROJECTS.
8. BEGIN FORMULATION OF WHAT IS NECESSARY FOR THE NFIB PROGRAM PACKAGE (N 9 MONTHS), & INITIATE SOME ASPECTS.
9. UPDATE AND/OR COMPLETE ALL PROJECT DOCUMENTATION
10. REVIEW "OLD CL DATA BASE" (SUMMARIZE, ASSESS)
11. REENERGIZE "ICTASK REVIEW GROUP", + "OVERSIGHT PANEL".
12. IMPLEMENT RANDOM MONITORING/RECORDING OF ALL SESSIONS.
13. VARIOUS ADMIN ISSUES.

14. PROVIDE IMPROVED LIAISON WITH R/D SECTION & SUPPORT  
WHERE APPROPRIATE, WITH S.S.

15. PROVIDE POLITICAL LIAISON WITH C. R. R. R. R.

16. DEFINE INT. NEEDS THAT RV COULD ADDRESS, & QUANTIFY.

ADDITIONAL NEEDS -- REEVALUATE DETAILS

1. REVISE UTILITY ASSESSMENT PROJECTS & PROCEDURES.

- 50-100 PROJECTS
- VARIOUS CONDITIONS, OBJECTIVES.
- REVISE DATA SUMMARY, PROVIDE INTERPRETATIONS.

2. IMPROVE OPERATIONAL PROJECT RECORDS, PROCEDURES

- ALL PERTINENT DATA, SUMMARY MOD (GEN, SPECIFIC, QUAL/QUANT)
- PROVIDE IMPROVED "INTERPRETATIONS" FOR SUMMARY DATA.

3. REEVALUATE, COMPLETE ALL EVALS..

- DT, OTHERS (DA...)
- DEVELOP "IN-DEPTH" EVALUATIONS, USING SEVERAL PROCEDURES FOR A REPRESENTATIVE NO. OF CASES (10, 40334 SET, LIVE-LINE COMPARISON, TOPIC-CONTENT, CONCEPT ANALYSIS..).

4. TRENDS, PATTERNS

- WHAT WORKS, WHAT DOESN'T
- SENSITIVITY TO VIEWER TYPES, PREFERENCES, BACKGROUND.

5. DATA BASE ANALYSIS

- ON GOING CHARTS, TABLES, ALL CATALOGUES

6. REEVALUATE TO LOOK FOR POTENTIAL BIASING

- TYPE, DEGREE OF FEEDBACK IN & SESSION NO.
- INITIAL MONITOR KNOWLEDGE & PROGRESSIVE KNOWLEDGE

7. REEVALUATE TRAINING METHODS

- METHOD VS PRACTICE ; ROLE OF GOAL, MOTIVATION ..?

8. BEGIN FORMULATION OF NFIR PACKAGE

- TRENDS, PATTERNS, WHAT CAN DO, WHAT CAN'T DO...

9. UPDATE ANKOR COMPLETE PROJECT DOCUMENTATION

- SECURITY GUIDELINES PROCEDURES
- SESSION PROTOCOL (DEFINE ALL STEPS, CONTROLS ....)
- EXPAND TRAINING MANUAL
- DEFINE VARIOUS EVALUATION METHODOLOGIES
- REFORMAT DATA SHEETS, DATA REPORTING FORMAT  
(INCLUDE GENERAL, SPECIFICS, QUALIFIERS...)
- EXPAND "INCIDENTALIES" (LIST OF MOTIV, OTHER FACTORS...)

10. REVIEW OLD CL DATA BASE :

- RETAIN SUMMARY
- KEEP FILES WHERE OPS PROJECT IS LISTED IN REPORTS
- PROVIDE OVERVIEW, LESSONS LEARNED, ETC.

11. REVIEW GROUPS (1 TASK GROUP, EX OVERSIGHT PANEL) -- REACTIVATE

- ESPECIALLY FOR EVENTUAL NFIB PACKAGE ...
- SET UP ADDITIONAL TEST PROTOCOL REVIEW (FIDELITY? ...)

12. MONITORING (RANDOM SAMPLE FOR ALL)

13. ADMIN ISSUES.

- RULES ... CLEARLY ... DEFINING ...
- SCHED & CONDUCT MONTHLY "DETAILED" REVIEWS
- REEXAMINE ALL FILES (FILTER OUT NON-RELEVANT ISSUES)
- CLARIFY FILE SECURITY; IMPLEMENT NEW PROCEDURES IF REQUIRED
- DEVELOP FOLLOW-ON PROCEDURES FOR PREVIOUS RETRA MEMBERS
- MISC PERS ISSUES (BE ALERT TO POT. DIFFICULTIES, PD-EFFECT OF METHODOLOGY, TARGET TYPES ... OR VIEWERS...)
- IMPROVE FILES / RECORDS

- WHO HAS ACCESS TO FACILITIES  
- INSURE APPROPRIATE + MAX. NO. OF SESSIONS  
- ADV. ETC. OF THE ANKOR

RECOMMENDATIONS

- INCORPORATE APPLICABLE RESULTS FROM SRI WORK,  
OR FROM FINDINGS IN OTHER LABS
- SET UP "MUTUAL EXCHANGE", EVEN JOINT EXP., WITH  
SRI
- COOPERATE WITH "DEMO TYPE" PROJECTS OF INTEREST  
TO DARPA...
- PREPARE SUMMARIES, ETC OF RESEARCH, FOR SS FILES.
- SET UP FREQUENT MTGS WITH RESEARCHERS WHEN  
APPROPRIATE (IO, SRI STAFF ...)
- MONITOR IMIL (IO-COTR)

# REVISE US/UK ASSESSMENT PROJECTS AND PROCEDURES

## 1. PROJECTS:

- SET UP ~100 TARGETS / PROJECTS (incl. General Groups <sup>odm TR</sup> <sub>exploratory</sub> <sub>indicative</sub>)
- DEFINE WHO DOES, HOW ~~SELECTED~~ &
- DEVELOP TO BE "HOMOGENEOUS"
  - MIX of S/T, TACT/OPS, NOT TEC, <sup>search</sup> <sup>PLACES</sup> PEOPLE, OTHER OBJECTS
- WHO, HOW TO EVALUATE, SUMMARIZE
- HOW CONTROLLED? (1/2 IN DT-S, 1/2 IN DT 3, 20% AT SRI?)
- HOW SELECTED? (RANDOM, TO CLIM BINSSES)
- DERIVE TARGETING METHODS, INSTRUCTIONS, WHAT IS KNOWN, BY WHOM & WHEN...
- EXAMINE FOR VARIOUS TARGETING PROCEDURES, METHODOLOGIES,
  - SRV, WOV ... <sup>beacon</sup>...

## 2. CONTROLS / CONDITIONS:

- SET LIMITS TO SESSION NO'S.
  - RECORD DATE AN LOSSIER, <sup>stage of feedback</sup> <sup>define</sup> (define).
- VARY ~~DATA~~ CONDITIONS TO INITIATION:
  - (CLASSIC DOUBLE BLIND (for sumo, INITIALS), (CLASSIC VARYING DEGREES)
  - TRANSITION TO "OPS CONDITIONS" (LOADING...)
- RECORD ALL SIGNIFICANT BACKGROUND DATA. (INCIDENCES, DISTRACTIONS <sup>week 1</sup>)
- DEFINE WHAT IS DESIRED (the ind. QUESTION, gen or specific)
- Define what is important (gen, specific); intent, external, analysis...
- VARY LOCATION OF focused package
- SHOW how these relate or transition to ops, but + odm TR
- IN (or) with ops ... etc...

## 3. ASSESSMENTS

- LOOK for <sup>trade</sup> variables (to help in assessing people's <sup>ops</sup> <sup>potential</sup>... <sup>prej</sup>
  - acceptance or not... known inclinations, motivation...
- SIGNIFICANT INPUT for WIP report, predicting utility for potential ops projects...